CHAPTER 3

ACTIONS

COURSE ANNOUNCEMENTS

- Training generally announces new courses on a TTB Broadcast.

  NOTE: All classes should be sent through the TTB Training Coordinator for approval.

- Announcements are available on TTB Franchise Web Page.

- The course and session numbers for classes are located in the course announcements on Franchise Web Page.

Approvals and Disapprovals

Purpose

This section allows the Approving Officials to approve and disapprove training requests.

EDS provides a complete list of training requests requiring your approval.

NOTE: Follow the procedure in “Act as Another User” to approve requests for another approving official.

Procedure Approval

Step	Action
1	Select Approval Inbox from Actions menu.
2	Click on a training request and then on View. Screen displays course information.
3	Edit justification as needed. (See “How to Write a Good Training Justification” page 3-8)
4	Click on Continue. Screen displays Approve Employee for Training.
5	To route your request, choose the next approving official from the drop-down list.
6	Click on Approve & Route button.

Procedure Disapproval

Step	Action
1	Select Approval Inbox from Actions menu.
2	Select a training request and click on View. Screen displays course information.
3	Click on Disapprove. Screen displays a window in the upper left-hand corner.
4	Enter the reason for disapproval. (This field is limited to 1000 characters.) Click on OK.

NOTE: You receive a daily e-mail notification indicating there are requests in your Approval Inbox awaiting action. You receive e-mail notification every day until requests leave your inbox.

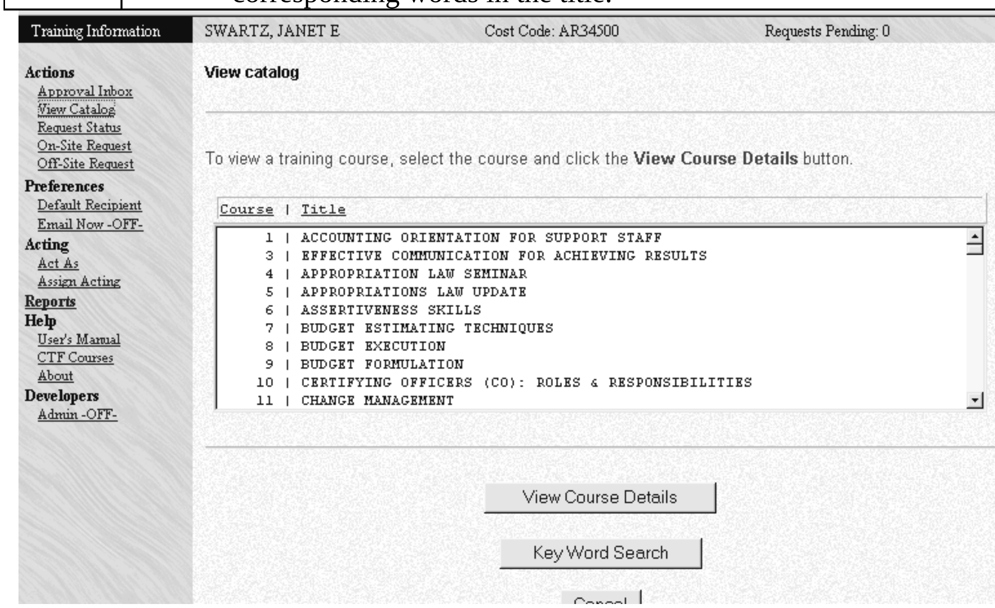
View Catalog

Purpose

This menu option allows you to view the catalog to see if a course you want already exists. This feature is available after the course catalog is populated. This is a **view only** option—you cannot enter a course into the catalog through this menu option.

Procedure

Step	Action
1	Select View Catalog from Actions menu.
2	Use one of two options: Option A: Sort the catalog by course number by clicking once on the column-heading <u>Course.</u> Option B: Sort the catalog alphabetically by clicking once on the column heading <u>Title.</u> **NOTE**: Key Word Search feature allows you to narrow your catalog search. 1. Click on Key Word Search button. Screen displays a window in the upper left-hand corner. 2. Type a word or series of words you are searching for. 3. Click on OK. The system displays only courses with corresponding words in the title.



Step	Action
3	To view course details, select a course title and click on View Course Details button. Screen displays course title, description, and objectives.
4	Click on Continue. Screen displays course sessions.
5	To view an existing session, select the session and click on the Session Detail button. Screen displays a session summary. This gives you a complete summary of the course.
6	Close the window to return to the previous screen.

Request Status or Current Location

Purpose

This checks the status of a training request and its current location. You can check the status and location—by employee, start date, or course—within a cost code.

Procedure Employee

To check the status or current location of a training request for an employee you have two options:

	Step	Action
Option A	1	Select Request Status from Actions menu.
	2	Screen displays Training Coordinator and Cost Code options. Choosing Training Coordinator displays a list of all employees who have you as their training coordinator. Choosing Cost Code displays a list of all employees within a specific cost code who have you as their training coordinator.
	3	Screen will display location and status of training requests sorted by employee name.
Option B	1	Select Reports from main menu. Screen displays list of reports. **NOTE:** If you are responsible for multiple cost codes you must change the cost code, and then select Reports.
	2	Under Active Training Reports select By Employee. Screen displays list of employees within the cost code.
	3	Select employee. Screen displays active training for this employee.

Procedure Start date

To check the status or current location of all training requests for a cost code by start date:

Step	Action
1	Select Reports from the main menu. Screen displays list of reports. **NOTE:** If you are responsible for multiple cost codes you must change the cost code, then select Reports.
2	Under Active Training Reports select By Start Date. Screen displays active training for all employees by start date.

Procedure Course

To check the status or current location of all training requests for a cost code by course:

Step	Action
1	Select Reports from the main menu. Screen displays list of reports. **NOTE:** If you are responsible for multiple cost codes you must change the cost code, then select Reports.
2	Under Active Training Reports select By Course. Screen displays active training for all employees by course.

PREPARING ON-SITE TRAINING REQUESTS

<u>ON-SITE TRAINING</u>

- Contracted with a training vendor or taught by internal instructors for TTB employees only.
- Paid by an individual office for that office's employees.
- Usually located in a designated TTB training site.
- Courses and sessions entered into the EDS by BPD ED—not the training coordinator.
- Normally requires no travel documentation.

<u>PREPARING TRAINING REQUESTS</u>

1. <u>Receive nominations from manager</u>

- Manager prioritizes nominations, and notes any alternates.
- You choose the priority from the Employee Selection page. Your order of selections from the employee list is the priority order of the request.

2. <u>Suspense dates</u>

- Submit nominations as soon as possible after notification from the manager.
- Submit nominations through the EDS before the deadline on the announcement.
- Nominations must be received in BPD ED by the nomination deadline.
- Selection occurs the day after the nomination deadline.

Chapter 2 <u>AFTER SELECTIONS ARE MADE</u>

- E-mail goes to employees notifying them of their selection or non-selection. A copy goes to the training coordinator for reference. Employees may view their training requests on TTB Franchise Web Page by clicking on *Your Training File* and choosing Request Status.

- A Training Coordinator has three options to track the status of training requests:
    1. Use your copy of the employee's e-mail as a tickler.
    2. Select Request Status from the Actions menu in the EDS.
    3. Choose Reports from the EDS menu and view an Active Training Report.

<u>AFTER TRAINING IS COMPLETE</u>

- EDS automatically generates evaluations after employees complete training.
- Employees receive an e-mail notifying them to access and complete their evaluation in *Your Training File* on TTB Franchise Web Page. If a contractor supplied the course, employees will forward a copy of their completion certificate to BPD ED.
- After all employees in the class complete their evaluations, BPD ED closes out the course.
- If employees do not complete the evaluation within three days, the training coordinator receives an e-mail, which should be forwarded to the employee's immediate supervisor.

HOURS OF WORK AND TRAINING

Training policies and procedures are currently undergoing modifications to change to TTB's classification system. Until training directives are revised to reflect TTB's policies, employees are to adhere to the procedures outlined in the existing ATF Directive. The below listed information is also supported in documentation contained in the NTEU contract.

You may have to change your work schedule to attend training. If you are on an Alternative Work Schedule (AWS), you may need to change to an eight-hour day schedule for the pay period in which the training is being conducted. If your normal tour of duty is eight hours per day, you may be required to change your staring and ending times to accommodate the hours of the class you're attending.

If you have any questions or need additional information, please contact your TTB Office of Training and Professional Development at (202) 927-0435 for additional clarification.

PROCEDURES FOR ON-SITE CANCELLATIONS/SUBSTITUTIONS

This section will give you the necessary steps to cancel or substitute an employee for onsite training.

- The supervisor or manager must approve all cancellations and substitutions.
- Notify BPD ED of a cancellation or substitution as soon as possible.
- Substitutions are first made from the alternate list from the canceling office. If the training coordinator is unsure who is an alternate, please call BPD ED.
- Selections from the alternate list are based on the priority order. Last minute cancellations will result in BPD ED selecting the first available alternate.
- Employees on the alternate list, if any, are normally selected to fill a canceled space in a class. New nominations are accepted only after the alternate list is exhausted. For unusual circumstances, please call BPD ED for assistance.
- A new training request is not required when the employee is on the alternate list.
- If the substitute is not from the alternate list, the training coordinator must submit a training request within three days of the training.

HOW TO WRITE A GOOD TRAINING JUSTIFICATION

As a training coordinator, you are <u>not</u> responsible for writing training justifications for the employees you service. However, you should advise employees of the characteristics of a good justification.

Preparing a justification for training can be confusing. The most common mistake is providing only a course description or just stating “to improve present performance.” A good training justification tells how the training will improve performance or benefit the work unit. Ask yourself the question “Why do I need this training?” The following are examples of training justifications—good and not so good.

<u>Course: How to Interview People</u>

<u>Justification</u>: “This course will help the employee develop interviewing skills, thus improving selections for the positions supervised.”

Since this employee is a supervisor, this justification shows how the training relates to the employee’s job and how the employee will apply the skills learned in the class on the job.

<u>Course: Writing for Results</u>

<u>Justification</u>: “The applicant is required to write reports and memos. This class will enhance the employee’s writing skills.”

This employee is a program analyst who writes reports. This justification shows how the class relates to the employee’s position.

<u>Course: On-The-Job-Training Techniques</u>

<u>Justification</u>: “To develop and maintain proper techniques for training.”

This justification does not say how this course will help the employee, an accounting technician. The justification could be improved by saying, “The employee trains new employees and coworkers in accounting procedures. This course will help develop and maintain proper techniques to perform this requirement.”

<u>NOTE:</u> Never use “this course will help me get a promotion” or “this course is required in my degree program” since federal training regulations prohibit training solely to get a promotion or a degree.

Initiate On-Site Training Request

Purpose

This guide is for submitting training requests for on-site courses.

Definition

<u>On-site training</u>. Training in rooms provided by TTB that meets one of the following criteria:

- Taught by internal instructors.
- Contracted with a training vendor by the TTB office.
- Contracted by individual offices for their employees.

Prior to starting

Assemble necessary information, including:

- Priorities—assigned by the manager.
- Training justification**.**
- Course and session numbers—from training announcements.

Procedure Begin request

Step	Action
1	Select On-Site Request from Actions menu.
2	Click on course and then on Select Course button. Screen displays course Confirmation page.
3	Click on Continue. Screen displays Session Selection page.
4	Click on a session and then on Session Detail button to view session information and close screen.
5	Click on session and then on Select Session button. Screen displays Session Summary page.
6	Click on Continue. Screen displays Justification page.

Procedure Justification

7	Select training Purpose from the drop-down list. Options are: • Mission or program change • New technology • New work assignment • Improve present performance • Meet future staffing needs • Develop unavailable skills • Trade or craft • Orientation • Adult basic education
8	Type in justification—**why** this employee needs the training. (See “How to Write a Good Training Justification” page 3-8) NOTE: All employees chosen using the multi-select feature will have the same purpose and justification.
9	Click on Continue. Screen displays Employee Selection page.

Procedure Routing and employee selection

10	Click on Create Routing Slip. Type a list of names in the Routing Slip window. All training requests will be routed through Val White, TTB Training Coordinator. Training should always be the last name on the list. Click on Save button.
11a	You may select a single employee and click on Add. You may select multiple employees by clicking while pressing CTRL, and then click on Add. NOTE: Employees are prioritized in the order they appear in the selection box.
11b	**New Hire—<u>Before</u>** using this option, choose the immediate supervisor from the routing drop-down list. You will **not** return to this screen after entering new hire information. Use the New Hire option to submit training requests for employees in their first month of employment. Submit new hires separately after submission of your other requests.
12	Route your request by using the drop-down box. Click on Submit Request. Screen displays Submission Confirmation page.

Initiate On-Site Training Request with Travel

Purpose

This guide is for submitting training requests for on-site courses with travel.

Definition

On-site training. Training in rooms provided by TTB that meets one of the following criteria:

- Taught by internal instructors.
- Contracted with a training vendor by TTB.
- Contracted by individual offices for their employees.

Prior to starting

Assemble necessary information, including:

- Priorities—assigned by the manager.
- Training justification.
- Course and session numbers—from training announcements.

Procedure
Begin request

Step	Action
1	Select On-Site Request from Actions menu.
2	Click on course and then on Select Course button. Screen displays Course Confirmation page.
3	Click on Continue. Screen displays Session Selection page.
4	Click on a session and then on Session Detail button to view session information and close screen.
5	Click on session and then on Select Session button. Screen displays Session Summary page.
6	Click on Continue. Screen displays Justification page.

Procedure
Justification

7	Select training Purpose from the drop-down list. Options are: • Mission or program change • New technology • New work assignment • Improve present performance • Meet future staffing needs • Develop unavailable skills • Trade or craft • Orientation • Adult basic education
8	Type in justification—**why** this employee needs the training. (See “How to Write a Good Training Justification” page 3-8). **NOTE**: all employees chosen using the multi-select feature will have the same purpose and justification.
9a	Click on box "Check this if request requires travel."

	9b	Click on Continue. Screen displays Verify Indirect Cost—Travel Related Cost.

Procedure Indirect costs	10a	Using the drop-down box, choose the cost code paying for the indirect costs (airfare, M&IE, other travel costs).
	10b	Airfare—Type estimated costs of airfare.
	10c	M&IE—Type per diem for lodging, meals, and incidental expenses.
	10d	Other travel costs—Type in any other related travel costs, including taxi, tolls, parking, bus, etc.
	10e	Click on Continue. Screen displays the Employee Selection page.
Procedure Routing and employee selection	11	Click on Create Routing Slip. Type a list of names in the Routing Slip window. All training classes will be routed through Val White, TTB Training Coordinator. Training should always be the last name on the list. Click on Save button.

	12a	You may select a single employee and click on Add. You may select multiple employees by clicking while pressing CTRL, and then click on Add. **NOTE:** Employees are prioritized in the order they appear in the selection box.
	12b	**New Hire—<u>Before</u>** using this option, choose the immediate supervisor from the routing drop-down list. You will **not** return to this screen after entering new hire information. Use the New Hire option to submit training requests for employees in their first month of employment. Submit new hires separately after submission of your other requests.
	13	Route your request by using the drop-down box. Click on Submit Request. Screen displays Submission Confirmation page.

PREPARING AN OFF-SITE TRAINING REQUEST

OFF-SITE TRAINING

- Open enrollment classes at a site selected by the training vendor.
- Usually paid for by the office sending the employee.
- Located off-site—not in a TTB training room or a room provided by TTB.
- Course and session entered into the EDS by the training coordinator.
- May require travel and travel document preparation.

PREPARING TRAINING REQUEST

1. Receive nomination from manager

- Check course catalog to see if course is already in EDS.
- If so, use an existing session when possible.
- If not, enter the course and session in the EDS.

2. Information for the training request

- Course information must be entered accurately from the vendor's course catalog or other source.
- Note that the vendor address and the class location may differ.
- Vendor address is important—the bill is paid based on this address.

3. Suspense dates

- Check vendor's course information carefully for registration and discount deadlines.
- Some classes fill up quickly—submit training requests to allow BPD ED at least four weeks for registration.
- Keep track of the training request location—remind approving officials, if necessary, to prevent delays in routing. Check the location of training requests daily—select Request Status under the Actions menu in the EDS. If an item is not moving, electronically notify the approving official of the required action.

4. Payment Terms

- Always research carefully the vendor's payment terms.
- Some vendors require prepayment before the class or before a specific date.
- Sometimes a discount is given for prepayment.
- Choose the correct payment terms: Net 30, Prepayment, or Reimburse Employee
  1. Net 30 means the invoice is paid within 30 days of its receipt, or 30 days after completing the training, whichever is later.
  2. Prepayment alerts BPD ED that the training request requires special handling.
  3. Reimburse Employee means TTB reimburses an employee for the cost of a class.

5. Backup documentation needed for registration

- Always send backup documentation for off-site courses to BPD ED. The address is: Bureau Public Debt, 200 Third Street, Attention: Employee Development, HB-107, Parkersburg, WV 26106-1328.
- You may fax the information (if there is a short turn around) to (304) 480-5221 once you submit the training request.

Please send:

- The pages of the catalog or brochure showing the course description. Include the page displaying the mailing label.
- The registration form—filled out completely—along with any other registration information. This information is critical if a participant must choose from sessions offered at a conference or seminar. If the registration forms are from the Internet, please make sure you do not submit the registration form on line. Complete the form, print it, and send it to BPD ED.
- Write the EDS course and session number on the top of the registration form.

6. Travel and tuition

- Travel and tuition are two separate issues. Travel documents should not be submitted until after you receive confirmation of the training registration.

AFTER SELECTIONS ARE MADE

- E-mail goes to employees, notifying them of their selection or non-selection. A reference copy goes to the training coordinator. Employees may view their training requests on TTB Franchise Web Page, by clicking on *Your Training File* and choosing Request Status.

- A Training Coordinator has three options to track the status of training requests:
  1. Use your copy of the employee's e-mail as a tickler.
  2. Select Request Status from the Actions menu in the EDS.
  3. Choose Reports from the EDS menu and view an Active Training Report.

Chapter 3 AFTER TRAINING IS COMPLETE

- EDS automatically generates evaluations after employees complete training.
- Employees receive an e-mail notifying them to access and complete their evaluation in *Your Training File* on TTB Franchise Web Page.
- After employees complete the evaluation, and BPD ED receives a completion certificate, transcript or grade slip, BPD ED closes out the training request.
- If employees do not complete evaluations within three days, their training coordinators receive an e-mail to be forwarded to the employee’s immediate supervisor.

Initiate Off-Site Request—Adding New Course and Session

Purpose

This section will help you submit training requests for new off-site courses**.**

Definitions

Off-site training. Open enrollment class located at a site selected by the training vendor—**not** in a TTB training room or a room leased by TTB—and usually funded by the employee's office.

Tuition Assistance. A program TTB provides to employees wishing to further their education outside regular work hours.

Prior to starting

Assemble necessary information, including:

- Vendor and course information from vendor's catalog, brochure, web site, etc.
  - ✓ Vendor address and phone number
  - ✓ Payment terms
  - ✓ Registration deadline
  - ✓ Class location
  - ✓ Course title, description, and objectives
  - ✓ Cost of tuition, books, and other fees
  - ✓ Estimated travel costs and per diem, as applicable
- Training justification

Procedure
Begin request

The following explains how to complete an off-site training request when the course is not in the EDS catalog:

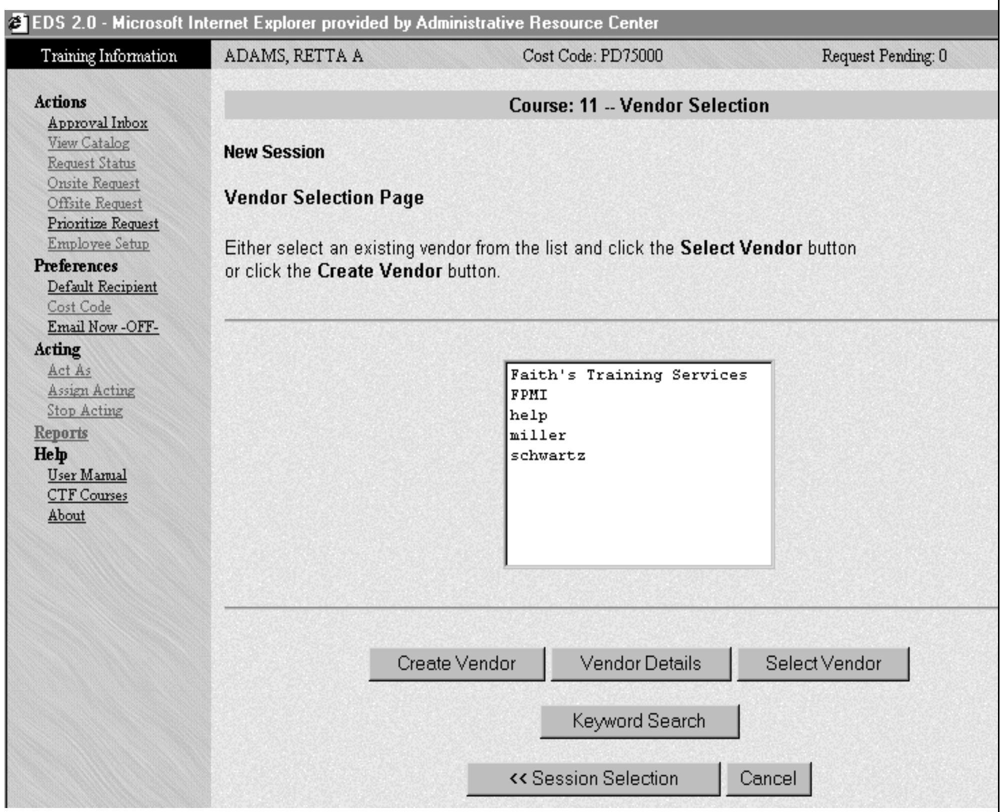
Step	Action
1	Select Off-Site Request from Actions menu.
2a	To search the course catalog, you may click on Title to view all courses in alphabetical order.
2b	To further search the catalog, you may click on the Key Word Search button. This allows you to enter a word or series of words from the course title. The system displays only courses in the catalog containing that word or series of words. If course is in the catalog, please see Initiate Off-site Request—Using Existing Course and Session. If course is not in the catalog click on Create Course button.

Procedure
Add course

3a	Title—Type the name of course.
3b	Description— Summarize course content.
3c	Objectives—Type what participants learn from the course.
4	Click on Save/Create Session button.

Procedure
Add vendor

5a	Screen displays New Session Vendor Selection page. If your vendor is in the list, select it and click on Select Vendor. Go to 5g. If you have a new vendor click on Create Vendor button and continue.



5b	Enter vendor's name.
5c	Answer the question: Is the vendor within or outside the U.S.? Click on Next.
5d	Vendor's Tax Identification Number (TIN) will default to a universal TIN for all training vendors. Click on Next.
5e	Enter vendor's address and phone number. Click on Next.
5f	Verify vendor information. Click on Save Vendor & Continue.
5g	Enter vendor contact information, if applicable. Click on Continue.

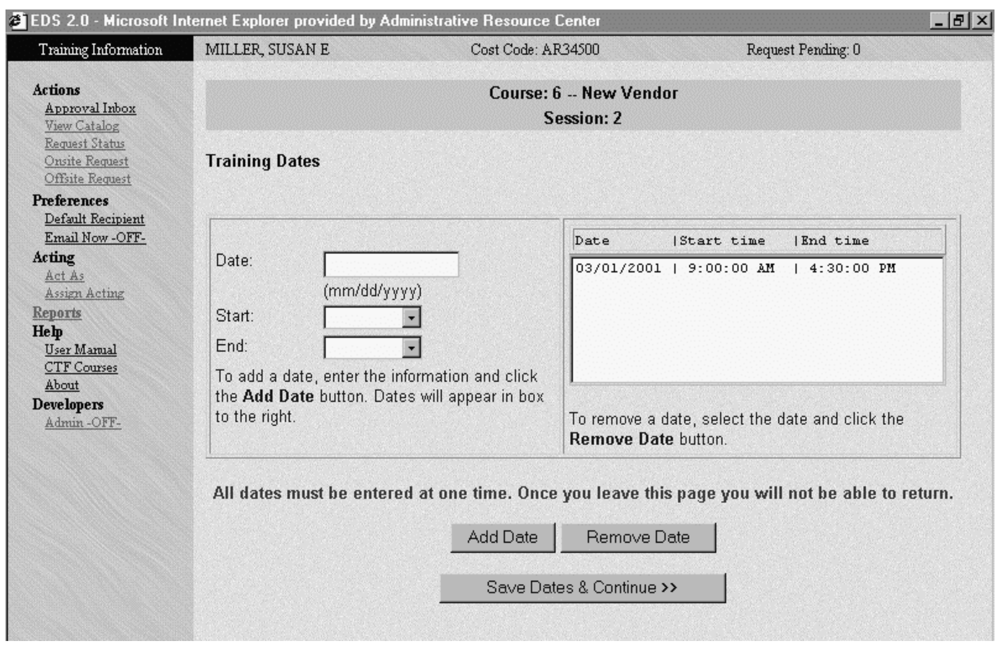
Procedure
Add session

6a	Answer the question: Is the training location in the U.S.? Click on Continue.
6b	Enter the address where the training will take place. Click on Continue.
6c	Audience—For whom is the training targeted?
6d	Type the number of hours in training during the workday in the Duty Hours box.
6e	Type the number of hours in training outside the workday in the Non-Duty box. Click on Continue.
7a	Type vendor's registration deadline, if there is one.
7b	Select a training source from drop-down list. Options are: • Government—Agency • Government—Interagency • Non-government—Designed for the Agency • Non-government—Off-the-shelf • State or local government
7c	Select a category from the Special Interest drop-down list. Options are: • No special interest • Executive development • Supervisory development • EEO • Information technology • Management development • Diversity • Business Continuity **ALERT: Accurate reports depend on correct code entry here.**
7d	Select the Type of training from the drop-down list. Options are: • Executive and management • Supervisory • Legal, medical, scientific, or engineering • Administration and analysis • Specialty and technical • Clerical • Trade or craft • Orientation • Adult basic education • Computer security

7e	Select the type of Training Method from the drop-down list. Options are: • Instructor-led • Self-study • Computer-based training (CBT) • Online training • Video-conferencing • Satellite • Telephone Click on Continue. **NOTE: Screen displays verification of session information. To save information click on Save Session & Continue.**

Procedure
Add date

8a	Enter first date of class.
8b	Add times using drop-down box. Click on Add Date. **NOTE:** You must enter all dates and times for information to print on the employee's acceptance memo. Click on Save Dates & Continue.



Procedure
Direct costs

9a	Using the drop-down box, choose the cost code paying for the direct costs (tuition, books and other materials, other fees).
9b	Tuition—Type tuition cost. **Note: Include all discounts, if applicable.**
9c	Books and Materials—Type costs of books and materials.
9d	Other Fees—Add any other course-related fees. Click on Continue.

Procedure
Indirect costs

10a	Using the drop-down box, choose the cost code paying for the indirect costs (airfare, M&IE, other travel costs).
10b	Airfare—Type estimated costs of airfare.
10c	M&IE—Type per diem for lodging, meals, and incidental expenses.
10d	Other travel costs—Type in any other related travel costs, including taxi, tolls, parking, bus, etc. Click on Continue.
11	Screen displays a summary of all the session information. By clicking on Cancel, you may leave the system and return at a later time to complete the request. If you wish to continue, click on Continue.

Procedure
Justification

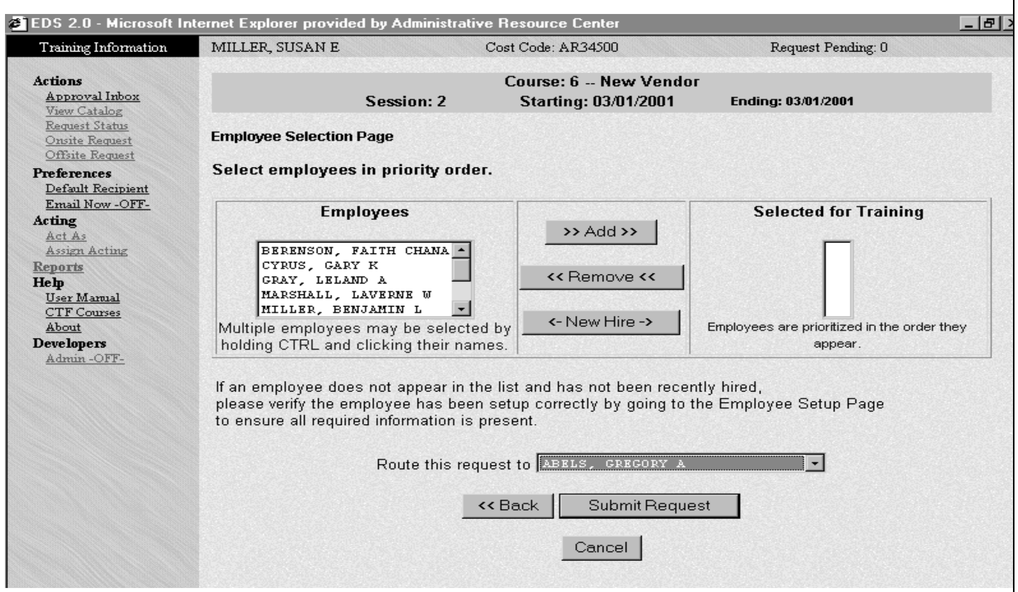
12a	Select training purpose from the drop-down list. Options are: • Mission or program change • New technology • New work assignment • Improve present performance • Meet future staffing needs • Develop unavailable skills • Trade or craft • Orientation • Adult basic education
12b	Justification—**why** this employee needs this training. (See "How to Write a Good Training Justification" page 3-8) **NOTE:** All employees chosen using the multi-select feature will have the same purpose and justification.
12c	Select a reporting category, if needed.
12d	Select payment terms—when the tuition needs to be paid to the vendor. Options are: • Net 30—The invoice is paid 30 days after receipt, or 30 days after course completion, whichever is later. • Prepaid—Some vendors require prepayment to register. • Reimburse employee—Paid initially by the employee who is being reimbursed.
12e	Tuition Assistance—click on box if appropriate. **NOTE:** If the Tuition Assistance box is marked, a *Tuition Assistance Agreement* automatically prints when you submit the training request. The employee must sign the agreement and forward it to BPD ED. Click on Continue.
13a	System displays verification screen for direct costs. Click on Continue.
13b	System displays verification screen for indirect costs. Click on Continue.

14	Click on Create Routing Slip. Type a list of names in the Routing Slip window. All training requests must be routed through Val White, TTB Training Coordinator. Training should always be the last name on the list. Click on Save button.

Procedure Routing and employee selection

15a	You may select a single employee and click on Add. You may select multiple employees by clicking while pressing CTRL, and then click on Add. **NOTE:** Employees are prioritized in the order they appear in the selection box.

15b	**New Hire—<u>Before</u>** using this option choose the first approving official from the routing drop-down list. You will **not** return to this screen after entering new hire information. Use the New Hire option to submit training requests for employees in their first month of employment. Submit new hires separately after submission of your other requests.



16	Route your request by using the drop-down box. Click on Submit Request. Screen displays Submission Confirmation page.

TUITION ASSISTANCE—POLICIES AND PROCEDURES

Background

TTB may provide tuition assistance to employees who wish to further their education outside of work hours. TTB may pay for such courses that further our mission and performance goals contingent on the employee earning a grade of C or better in the course.

Justification for Tuition Assistance

TTB may provide tuition assistance for any individual course that may help the organization meet its mission and performance goals. Mission-related training must meet at least one of the following criteria:

- Improve organizational performance (at any level).
- Improve the employee's current job performance.
- Allow for expansion or enhancement of employee's current job performance.
- Enable employee to perform needed or potentially needed duties outside the current job at the same level of responsibility.
- Meet organizational needs in response to human resource plans and re-engineering, downsizing, restructuring, or program changes.

Employees must provide a justification that explains how the requested course will benefit TTB.

Prohibitions

5 U.S.C. 4107 prohibits training for the sole purpose of obtaining an academic degree, except when there is a shortage of qualified personnel in the specified field.

TTB cannot use the tuition assistance program to pay for training that is primarily to prepare an employee for a promotion. TTB must follow competitive procedures consistent with merit system principles when selecting employees for such training.

Requesting Tuition Assistance

Employees must request tuition assistance from their supervisors six (6) weeks before the school's registration deadline to allow time for approvals and processing. A training request (SF-182) must be approved and printed before the registration deadline.

Even if the employee initially pays for the course, to be considered for reimbursement from TTB, the request for training and approval must occur before the course begins.

Continued on next page

TUITION ASSISTANCE—POLICIES AND PROCEDURES
(Continued)

Payment of Expenses

The employee's office pays for tuition and fees under the tuition assistance program. Offices may place limitations on these fees. Travel expenses, late registration fees, social or activities fees, and graduation fees are the employee's responsibility.

Tuition Assistance Agreement

All employees requesting tuition assistance must sign a ***Tuition Assistance Agreement***. The Employee Development System prints this automatically when a tuition assistance request is submitted. BPD ED will not register the employee for training without the signed agreement.

Employees must receive a grade of "C" or better to fulfill the tuition assistance agreement. Otherwise, the employee must reimburse TTB for the training cost. Employees must furnish a copy of their grade slip to their training coordinator.

Withdrawal from Tuition Assistance Course

Employees withdrawing from a tuition assistance course must notify their supervisor and the training coordinator immediately. The training coordinator is responsible for notifying BPD ED.

Employees who do not complete a course must reimburse TTB for the training cost—as documented in the ***Tuition Assistance Agreement***.

Initiate Off-Site Request—Adding New Session

Purpose

This section helps you submit a new training session using an existing off-site course**.**

If you need to submit a new training request using an existing session, see Initiate Off-site Request—Using Existing Course and Session.

Definition

Off-site training. Open enrollment class located at a site selected by the training vendor—**not** in a TTB training room or a room leased by TTB—and usually funded by the employee's office.

Tuition Assistance. A program TTB provides to employees wishing to further their education outside regular work hours.

Prior to starting

Assemble necessary information, including:

- Vendor and course information from vendor's catalog, brochure, web site, etc.
  - ✓ Vendor address and phone number
  - ✓ Payment terms
  - ✓ Registration deadline
  - ✓ Class location
  - ✓ Course title, description, and objectives
  - ✓ Cost of tuition, books, and other fees
  - ✓ Estimated travel costs and per diem, as applicable

- Training justification

Procedure
Begin request

The following explains how to complete an off-site training request when the session is not in the EDS catalog:

Step	Action
1	Select Off-Site Request from Actions menu.
2a	To search the course catalog, you may click on Title to view all courses in alphabetical order.
2b	To further search the catalog, you may click on the Key Word Search button. This allows you to enter a word or series of words from the course title. The system displays only courses in the catalog containing that word or series of words. If course is not in the catalog, please see Initiate Off-site Request—Add New Course and Session.

Procedure

3a	Click on the course, click on the Select Course button.

Select course	3b	Screen displays the Confirmation page, click on Continue.
	3c	Screen displays Session Selection page.
	4	Click on Create Session button.

Procedure **Add vendor**	5a	Screen displays New Session Vendor Selection page. If your vendor is in the list, select it and click on Select Vendor. Go to 5g. If you have a new vendor click on Create Vendor button and continue.
	5b	Enter vendor's name.
	5c	Answer the question: Is the vendor within or outside the U.S.? Click on Next.
	5d	Vendor's Tax Identification Number (TIN) will default to a universal TIN for all training vendors. Click on Next.
	5e	Enter vendor's address and phone number. Click on Next.
	5f	Verify vendor information. Click on Save Vendor & Continue.
	5g	Enter vendor contact information if applicable. Click on Continue.

Procedure **Add session**	6a	Answer the question: Is the training location in the U.S.? Click on Continue.
	6b	Enter the address where the training will take place. Click on Continue.
	6c	Audience—For whom is the training targeted?
	6d	Type the number of hours in training during the workday in the Duty Hours box.
	6e	Type the number of hours in training outside the workday in the Non-Duty box. Click on Continue.
	7a	Type vendor's registration deadline, if there is one.
	7b	Select a training source from drop-down list. Options are: • Government—Agency • Government—Interagency • Non-government—Designed for the Agency • Non-government—Off-the-shelf • State or local government
	7c	Select a category from the Special Interest drop-down list. Options are: • No special interest • Executive development • Supervisory development • EEO • Information technology • Management development • Diversity • Business Continuity **ALERT: Accurate reports depend on correct code entry here.**

	7d	Select the Type of training from the drop-down list. Options are: • Executive and management • Supervisory • Legal, medical, scientific, or engineering • Administration and analysis • Specialty and technical • Clerical • Trade or craft • Orientation • Adult basic education • Computer security
	7e	Select the type of Training Method from the drop-down list. Options are: • Instructor-led • Self study • Computer-based training (CBT) • Online training • Video-conferencing • Satellite • Telephone Click on Continue. **NOTE: Screen displays verification of session information. To save information click on Save Session/Continue.**

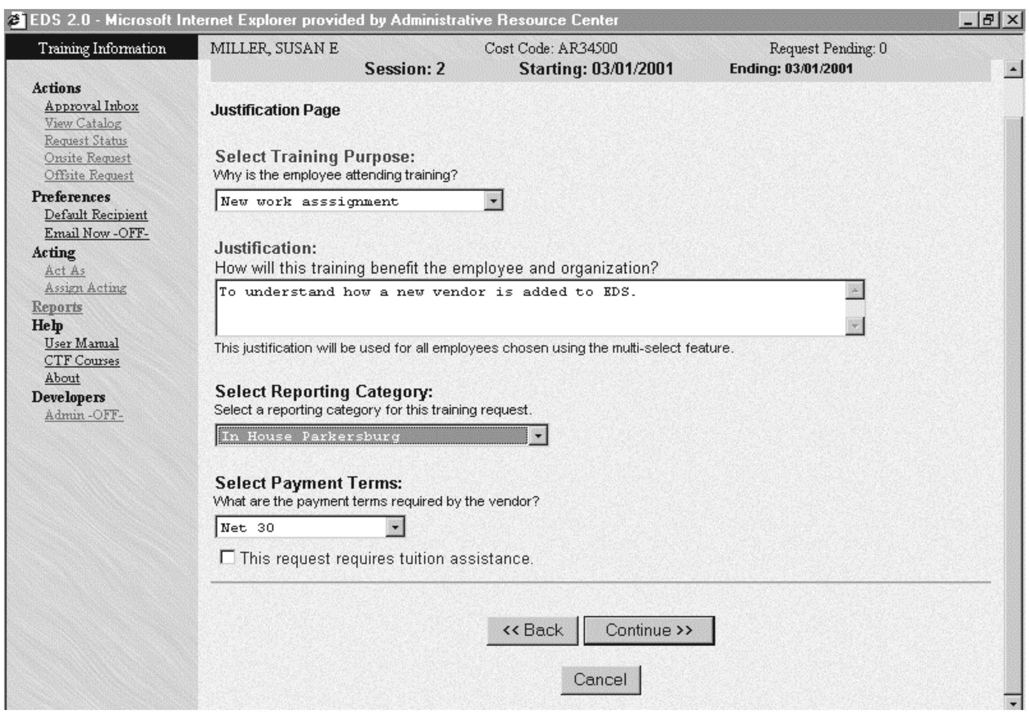
Procedure	8a	Enter first date of class.
Add date	8b	Add times using drop-down box. Click on Add Date. **NOTE:** You must enter all dates and times for information to print on the employee's acceptance memo. Click on Save Dates & Continue.

Procedure
Direct costs

9a	Using the drop-down list, choose the cost code paying for the direct costs (tuition, books and materials, other fees).
9b	Tuition—Type tuition cost. **Note: Include all discounts, if applicable.**
9c	Books and Materials—Type costs of books and materials.
9d	Other Fees—Add any other course-related fees. Click on Continue.

Procedure
Indirect costs

10a	Using the drop-down box, choose the cost code paying for the indirect costs (airfare, M&IE, other travel costs).
10b	Airfare—Type estimated costs of airfare.
10c	M&IE—Type per diem for lodging, meals, and incidental expenses
10d	Other travel costs—Type in any other related travel costs, including taxi, tolls, parking, bus, etc. Click on Continue.
11	Screen displays a summary of all the session information. By clicking on Cancel, you may leave the system and return at a later time to complete the request. If you wish to continue, click on Continue.



Procedure Justification

12a	Select training Purpose from the drop-down list. Options are: • Mission or Program change • New technology • New work assignment • Improve present performance • Meet future staffing needs • Develop unavailable skills • Trade or craft • Orientation • Adult basic education
12b	Justification—**why** this employee needs this training. (See "How to Write a Good Training Justification" p-3-8.) **NOTE:** All employees chosen using the multi-select feature will have the same purpose and justification.
12c	Select a reporting category, if needed.
12d	Select payment terms—when the tuition needs to be paid to the vendor. Options are: • Net 30—The invoice is paid 30 days after receipt, or 30 days after course completion, whichever is later. • Prepaid—Some vendors require prepayment to register. • Reimburse employee—Paid initially by the employee who is being reimbursed.
12e	Tuition Assistance—click on box if appropriate. **NOTE:** If the Tuition Assistance box is marked, a *Tuition Assistance Agreement* automatically prints when you submit the training request. The employee must sign the agreement and forward it to BPD ED. Click on Continue.
13a	System displays verification screen for direct costs. Click on Continue.
13b	System displays verification screen for indirect costs. Click on Continue.
14	Click on Create Routing Slip. Type a list of names in the Routing Slip window. All training requests will be routed through Val White, TTB Training Coordinator. Training should always be the last name on the list. Click on Save button.

Procedure Routing and employee selection

15a	You may select a single employee and click on Add. You may select multiple employees by clicking while pressing CTRL, and then click on Add. **NOTE:** Employees are prioritized in the order they appear in the selection box.
15b	**New Hire—<u>Before</u>** using this option, chooses the first-line supervisor l from the routing drop-down list. You will **not** return to this screen after entering new hire information. Use the New Hire option to submit training requests for employees in their first month of employment. Submit new hires separately after submission of your other requests.
16	Route your request by using the drop-down box. Click on submit request. Screen displays Submission Confirmation page.

Initiate Off-Site Request—Copying a Session

Purpose

This section will help you create a new session for an existing course by copying an existing session and making minor changes to the session information.

Copying a session takes less time than creating a new session from scratch.

Definition

<u>Off-site training</u>. Open enrollment class located at a site selected by the training vendor—**not** in a TTB training room or a room leased by TTB—and usually funded by the employee's office.

<u>Tuition Assistance</u>: A program TTB provides to employees wishing to further their education outside regular work hours.

Prior to starting

Assemble necessary information, including:

- Vendor and course information from vendor's catalog, brochure, web site, etc.
  - ✓ Vendor address and phone number
  - ✓ Payment terms
  - ✓ Registration deadline
  - ✓ Class location
  - ✓ Course title, description, and objectives
  - ✓ Cost of tuition, books, and other fees
  - ✓ Estimated travel costs and per diem, as applicable

- Training justification

When to copy?

Copy a session when you need to change:

1. Vendor
2. Dates
3. Training location

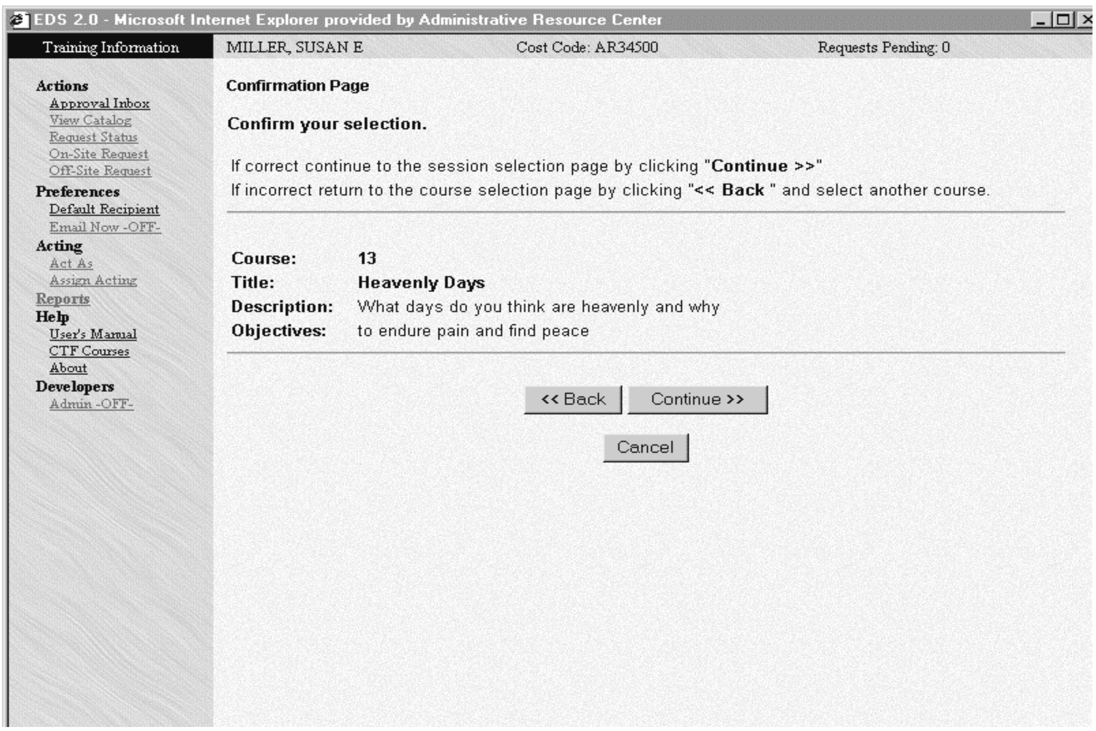
Procedure Begin request

The following explains how to complete an off-site training request when the session is not in the EDS catalog:

Step	Action
1	Select Off-Site Request from Actions menu.
2a	To search the course catalog, you may click on Title to view all courses in alphabetical order.
2b	To further search the catalog, you may click on the Key Word Search button. This allows you to enter a word or series of words from the course title. The system displays only courses in the catalog containing that word or series of words. If course is not in the catalog, please see Initiate Off-site Request—Add New Course and Session.

Procedure Select course

3a	Click on the course and then on the Select Course button.
3b	Screen displays the Confirmation page. Click on Continue.



Procedure Copy session

4a	Screen displays Session Selection page. To choose the best session for your needs click on a session and then on Session Detail to review Session Information. Close screen.
4b	Click on a session that best fits your needs and then click on Copy Session button.

5	Screen displays Copying Session Vendor Selection page, with the vendor from the session being copied currently highlighted. You now have three options: 1. If you want the same vendor from the session being copied, click on Select Vendor button and go to 6g. 2. If you want a different vendor, locate the vendor in the vendor list, click on the vendor, and click on Select Vendor button. Go to 6g. 3. If you need to create a new vendor, click on Create Vendor button and continue.
6a	Enter vendor's name.
6b	Answer the question: Is the vendor within or outside the U.S.? Click on Next.
6c	Vendor's Tax Identification Number (TIN) will default to a universal TIN for all training vendors. Click on Next.
6d	Enter vendor's address and phone number. Click on Next.
6e	Verify information. Click on Save Vendor/Continue.
6f	Enter Vendor Contact Information if applicable. Click on Continue.
6g	Screen displays New Session Vendor Contact Information and Notes. Enter vendor contact information, if applicable. Click on Continue.
7	Answer the question: Is the training location in the U.S.? Click on Continue.
8	Edit address, audience, duty and non-duty hours, registration deadline, training source, special interest, training type, and training method as necessary. **NOTE: Screen displays verification of session information. To save information click on Save Session/Continue.**

Procedure
Add date

9a	Enter first date of class.
9b	Add times using drop-down box. Click on Add Date. **NOTE**: You must enter all dates and times for information to print on the employee's acceptance memo. Click on Save Dates and Continue.

Procedure
Direct costs

10a	Using the drop-down box, choose the cost code paying for the direct costs (tuition, books and materials, other fees).
10b	Tuition—Type tuition cost. **Note: Include all discounts, if applicable.**
10c	Books and Materials—Type costs of books and materials.
10d	Other Fees—Add any other course-related fees. Click on Continue.

Procedure
Indirect costs

11a	Using the drop-down box, choose the cost code paying for the indirect costs (airfare, M&IE, and other travel costs).
11b	Airfare—Type estimated costs of airfare.
11c	M&IE—Type per diem for lodging, meals, and incidental expenses.
11d	Other travel costs—Type in any other related travel costs, including taxi, tolls, parking, bus, etc. Click on Continue.
11e	Screen displays a summary of all the session information. By clicking on Cancel, you may leave the system and return at a later time to complete the request. If you wish to continue, click on Continue.

Procedure
Justification

12a	Select training purpose from the drop-down list. Options are: • Mission or program change • New technology • New work assignment • Improve present performance • Meet future staffing needs • Develop unavailable skills • Trade or Craft • Orientation • Adult basic education
12b	Justification—**why** this employee needs this training. (See "How to Write a Good Training Justification" page 3-8.) **NOTE:** All employees chosen using the multi-select feature will have the same purpose and justification.
12c	Select a reporting category, if needed.
12d	Select payment terms—when the tuition needs to be paid to the vendor. Options are: • Net 30—The invoice is paid 30 days after receipt, or 30 days after course completion, whichever is later. • Prepaid—Some vendors require prepayment to register. • Reimburse employee—Paid initially by the employee who is being reimbursed.
12e	Tuition Assistance—click on box if appropriate. **NOTE:** If the Tuition Assistance box is marked, a *Tuition Assistance Agreement* automatically prints when you submit the training request. The employee must sign the agreement and forward it to BPD ED. Click on Continue.
13a	System displays verification screen for direct costs. Click on Continue.
13b	System displays verification screen for indirect costs. Click on Continue.

	14	Click on Create Routing Slip. Type a list of names in the Routing Slip window. All training requests will be routed through Val White, TTB Training Coordinator. Training should always be the last name on the list. Click on Save button.
Procedure Routing and employee selection	15a	You may select a single employee and click on Add. You may select multiple employees by clicking while pressing CTRL, and then click on ADD. **NOTE:** Employees are prioritized in the order they appear in the selection box.
	15b	**New Hire—<u>Before</u>** using this option, choose the first-line supervisor from the routing drop-down list. You will **not** return to this screen after entering new hire information. Use the New Hire option to submit training requests for employees in their first month of employment. Submit new hires separately after submission of your other requests.
	16	Route your request by using the drop-down box. Click on Submit Request. Screen displays Submission Confirmation page.

Initiate Off-Site Request—Using Existing Course and Session

Purpose

This section helps you submit an off-site training request using an existing course and session when all existing information is correct.

This section also allows you to add a new training request funded by a different cost code using an existing session without creating a new session. If you need to create a new session see Initiate Off-Site Request—Adding New Session.

Definition

<u>Off-site training</u>. Open enrollment class located at a site selected by the training vendor—**not** in a TTB training room or a room leased by TTB—and usually funded by the employee's office.

<u>Tuition Assistance.</u> A program TTB provides to employees wishing to further their education outside regular work hours.

Prior to starting

Assemble necessary information, including:

- Vendor and course information from vendor's catalog, brochure, web site, etc.
  - ✓ Vendor address and phone number
  - ✓ Payment terms
  - ✓ Registration deadline
  - ✓ Class location
  - ✓ Course title, description, and objectives
  - ✓ Cost of tuition, books, and other fees
  - ✓ Estimated travel costs and per diem, as applicable

- Training justification

Procedure
Begin request

The following explains how to complete an off-site training request when the course and session are already in the EDS catalog:

Step	Action
1	Select Off-Site Request from Actions menu.
2a	To search the course catalog, you may click on <u>Title</u> to view all courses in alphabetical order.
2b	To further search the catalog, you may click on the Key Word Search button. This allows you to enter a word or series of words from the course title. The system displays only courses in the catalog containing that word or series of words. If course is not in the catalog, please see Initiate Off-site Request—Add New Course and Session.

Procedure

3a	Click on the course, click on the Select Course button.

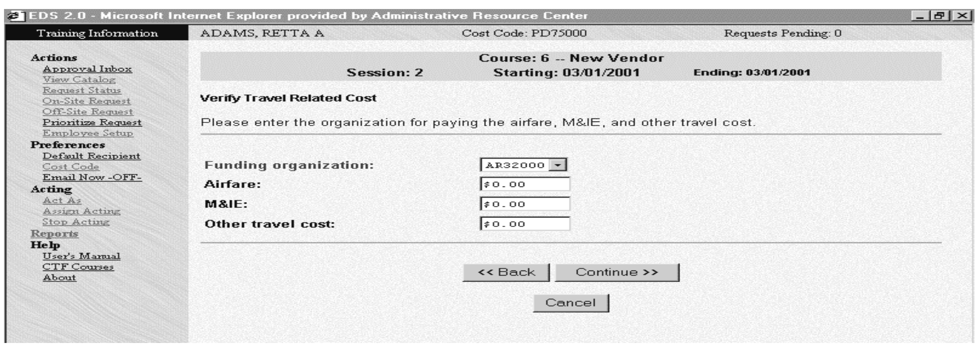
Select course

3b	Screen displays the Confirmation page. Click on Continue.
3c	Screen displays Session Selection page. Click on session and then on Select Session button.
4	Screen displays a summary of all the session information. By clicking on Cancel, you may leave the system and return at a later time to submit the request. If you wish to continue, click on Continue.

Procedure Justification

5a	Select training Purpose from the drop-down list. Options are: • Mission or program change • New technology • New work assignment • Improve present performance • Meet future staffing needs • Develop unavailable skills • Trade or Craft • Orientation • Adult basic education
5b	Justification—**why** this employee needs this training. (See "How to Write a Good Training Justification" page 3-8.) **NOTE:** All employees chosen using the multi-select feature will have the same purpose and justification.
5c	Select a reporting category, if needed.
5d	Select payment terms—when the tuition needs to be paid to the vendor. Options are: • Net 30—The invoice is paid 30 days after receipt, or 30 days after course completion, whichever is later. • Prepaid—Some vendors require prepayment to register. • Reimburse employee—Paid initially by the employee who is being reimbursed.
5e	Tuition Assistance—click on box if appropriate. **NOTE:** If the Tuition Assistance box is marked, a *Tuition Assistance Agreement* automatically prints when you submit the training request. The employee must sign the agreement and forward it to BPD ED. Click on Continue button.

Procedure **Choose funding** Option A Option B	6	System displays verification screen for direct costs (tuition, books and other materials, other fees). You now have two options: If the cost code shown in funding organization is correct for your request, click on Continue. If the cost code shown in funding organization is not correct for your request, choose the cost code paying for this request. Click on Continue. **NOTE:** You may also edit the costs, if necessary.
  Option A Option B	7	System displays verification screen for indirect costs (airfare, M&IE, other travel costs). You now have two options: If the cost code shown in funding organization is correct for your request, click on Continue. If the cost code shown in funding organization is not correct for your request, choose the cost code paying for this request. Click on Continue. **NOTE:** You may also edit the costs, if necessary.



	8	Click on Create Routing Slip. Type a list of names in the Routing Slip window. All training requests will be routed to Val White, TTB Training Coordinator. Training should always be the last name. Click on Save button.
Procedure **Routing and** **employee selection**	9a	You may select a single employee, and click on Add. You may select multiple employees by clicking while pressing CTRL, and then click on Add. **NOTE:** Employees are prioritized in the order they appear in the selection box.
	9d	**New Hire—<u>Before</u>** using this option, choose the first-line supervisory from the routing drop-down list. You will **not** return to this screen after entering new hire information. Use the New Hire option to submit training requests for employees in their first month of employment. Submit new hires separately after submission of your other requests.
	10	Route your request by using the drop-down box. Click on Submit Request. Screen displays Submission Confirmation page.

Initiate Training Request for a New Hire

Purpose

Use this section if you are submitting a training request within the first month of employment.

Note: This procedure is tied to the training request not the employee. For each submission until the employee appears in your Employee Setup area, you must use the New Hire procedure.

The New Hire button only appears on the Employee Selection Screen.

Prior to starting

Check the following:

- Employee Setup to see if employee is listed.
- If the employee is reassigned from another cost code and you need to submit a training request, please call either the employee's previous training coordinator or the ARC Support Desk, at (304) 480-8000
- Who do you want to route this training request to?

Before you begin

Assemble necessary information, including:

✓ Last name
✓ First name
✓ Middle name or initial
✓ User ID
✓ Cost code
✓ Telephone number
✓ Fax number
✓ Email address
✓ Special arrangements
✓ Training coordinator
✓ Priority

Warning!

<u>Before</u> using this option, choose your routing from the routing drop-down list. You will not return to this screen after entering new hire information.

Procedure

Step	Action
1	On the Employee Selection page, click on the New Hire button.
2	Screen displays the items listed above, complete each item and click on Save. **ALERT: If you submit a New Hire request along with other requests for the same course, you will need to check the priority using the Prioritize Request menu.**

CANCELING/SUBSTITUTING OFF-SITE TRAINING REQUESTS

This section gives the steps to cancel or substitute an employee for offsite training.

- The supervisor or manager must approve all cancellations and substitutions.
- Notify BPD ED immediately if a cancellation or substitution is necessary.
- BPD ED notifies the vendor.
- You may avoid a cancellation fee if the vendor is notified within certain time frames.
- If the agency wants to substitute for the cancelled employee, submit a training request through the EDS for the substitute employee—using the substitute feature.
- If a vendor notifies an employee or the training coordinator directly that they have cancelled a course, please notify BPD ED immediately. Please confirm the caller's name, date, and time they called. BPD ED will contact the vendor to check on rescheduling the class.

Initiate Substitute Off-Site Training Request

Purpose

This section helps users submit a substitute training request.

Limitation

Submit **s**ubstitutes only for off-site training requests.

Only training coordinators can submit Substitutes.

Procedure

Step	Action
1	Select Request Status from the Actions menu.
2	Screen displays Training Coordinator and Cost Code options. Choosing Training Coordinator displays a list all employees who have you as their Training Coordinator. Choosing Cost Code displays a list of all employees within a specific cost code who have you as their Training Coordinator.
3	Select the employee currently scheduled to attend the training. **ALERT: If you cannot locate the current employee and course, contact the ARC Help Desk at 304-480-8000.**
4	Click on View.
5	Screen displays Request Status New Request. Click on Substitute button.
6	Screen displays Select a Substitute for Training.
7	Click on employee and then on Substitute.
8	Click on Create Routing Slip. Type a list of names in the Routing Slip window. Every training request will be routed through Val White, TTB Training Coordinator. Training should always be the last name. Click on Save button.
9	**New Hire—<u>Before</u>** using this option, choose routing from drop-down list. You will **not** return to this screen after entering new hire information. Use the New Hire option to submit training requests for employees in their first month of employment. Submit new hires separately after submission of your other requests.
10	Route your request by using the drop-down box. Click on Submit Request. Screen displays Submission Confirmation page.

Edit Disapproved Training Request

Purpose

This section helps the user resubmit a disapproved training request.

What can I edit on an off-site request?

You can edit only the following fields:

- Justification
- Priority
- Tuition assistance
- Purpose
- Payment terms
- Reporting category
- Tuition related costs
- Travel related costs

Procedure

Step	Action
1	Select Request Status from Actions menu.
2	Screen displays Training Coordinator and Cost Code options. Choosing Training Coordinator displays a list all employees who have you as their Training Coordinator. Choosing Cost Code displays a list of all employees within a specific cost code who have you as their Training Coordinator.
3	Click on the disapproved request.
4	Click on View.
5	Click on Change Routing Slip. Edit the list of names as needed. All training requests will be routed through Val White, TTB Training Coordinator. Training should always be the last name on the list. Click on the Save button.
6	Edit any of the fields listed above. NOTE: To edit other fields before resubmitting a request, contact the ARC Help Desk at 304-480-8000.
7a	Click on Resubmit.
7b	Screen displays Route Training Request.
8	Using the drop-down box, choose your routing. Click on Route.

What can I edit on an on-site request? You can edit the justification and priority.

Procedure

Step	Action
1	Select Request Status from Actions menu.
2	Screen displays Training Coordinator and Cost Code options. Choosing Training Coordinator displays a list all employees who have you as their Training Coordinator. Choosing Cost Code displays a list of all employees within a specific cost code who have you as their Training Coordinator.
3	Click on the disapproved request.
4	Click on View.
5	Click on Change Routing Slip. Edit the list of names as needed. All training requests will be routed through Val White, TTB Training Coordinator. Training should always be the last name on the list. Click on the Save button.
6	Edit justification and/or priority. NOTE: To edit other fields before resubmitting a request, contact the ARC Help Desk at 304-480-8000.
7a	Click on Resubmit.
7b	Screen displays Route Training Request.
8	Using the drop-down box, choose the routing. Click on Route.

Delete Disapproved Onsite Training Request

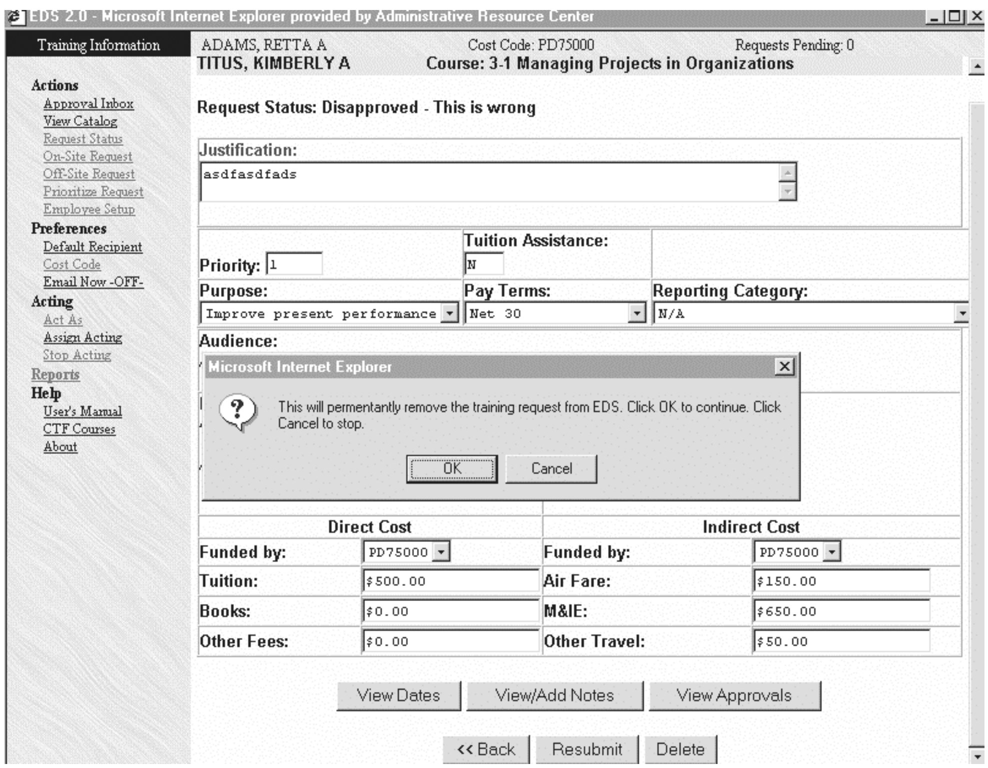
Purpose

This section helps the user delete a disapproved onsite training request.

NOTE: Offsite disapproved training requests are kept in the EDS until the end of the fiscal year for auditing purposes.

Procedure

Step	Action
1	Select Request Status from Actions menu.
2	Screen displays Training Coordinator and Cost Code options. Choosing Training Coordinator displays a list all employees who have you as their Training Coordinator. Choosing Cost Code displays a list of all employees within a specific cost code who have you as their Training Coordinator.
3	Click on the disapproved request.
4	Click on View.
5	Click on Delete.
6	Screen displays a warning to continue or cancel.



Verify or Change Priority on Training Request

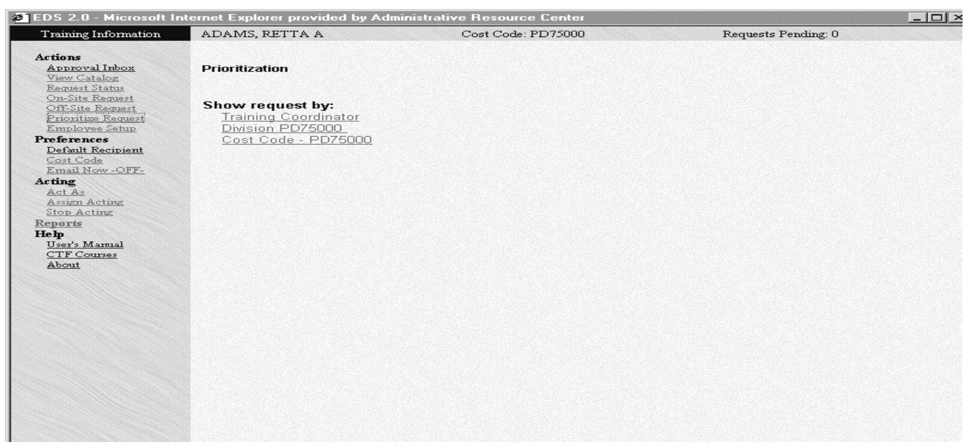
Purpose

This menu option allows you to verify or change the priorities assigned to employees before Training selects participants.

NOTE: You can only change priority before the nomination deadline. The class will not be available for prioritizing after the nomination deadline.

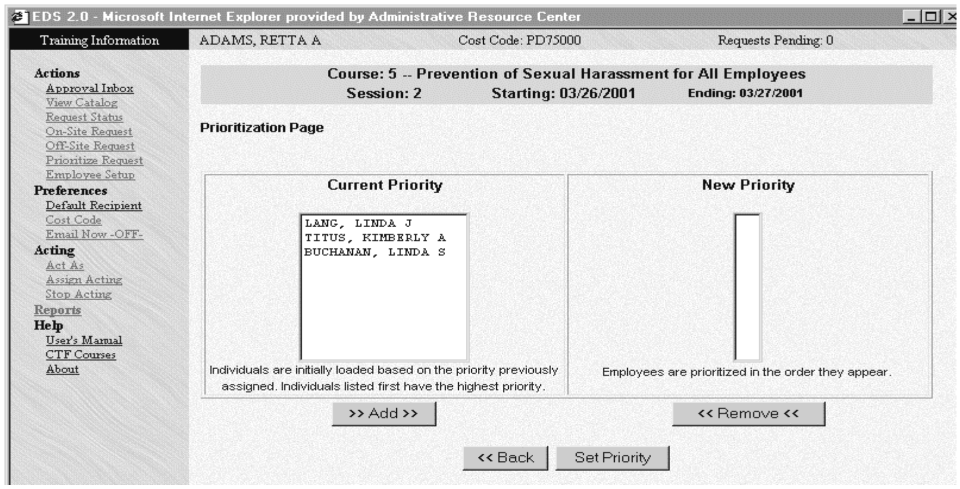
Procedure

Step	Action
1	Select Prioritize Request from the Actions menu.



	Step	Action
	2	Screen displays Training Coordinator and Cost Code Options.
Option A		Choosing Training Coordinator option displays a list of courses with employees who have you as their training coordinator.
Option B		Choosing Cost Code option displays a list of courses with employees in your cost code.
	3	Click on a course and then on Select button, or click on Priority Report if you want to view or print a priority report.

4	Screen displays the Prioritization page.



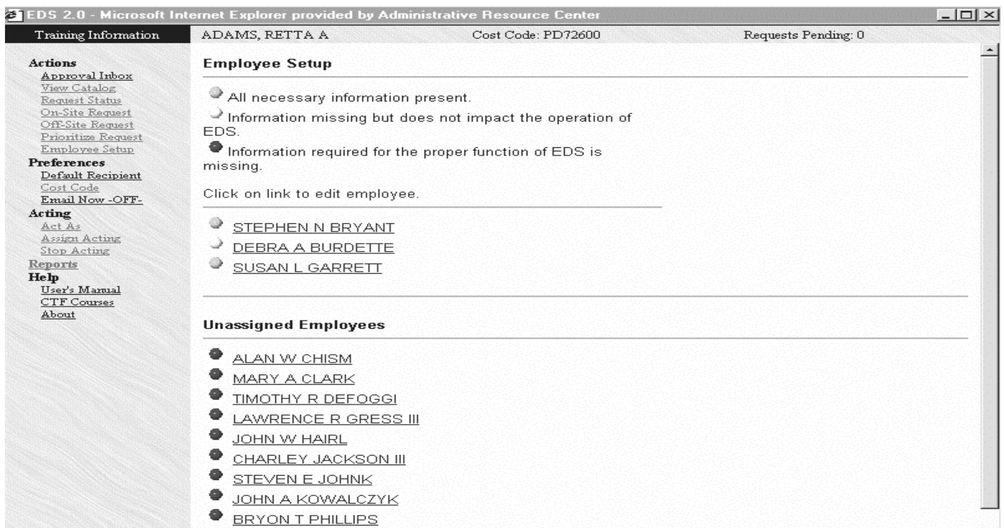
5	Click on an employee name and then on Add to move the employees one at a time to set the new priority.
6	Click on Set Priority. Screen displays the current priority list.

Employee Setup

Purpose

This section helps the user enter or edit employee information required for EDS use.

NOTE: You should call the ARC Support Desk (304) 480-8000) to receive the correct Employee User ID and Email address. The Employee User ID and email address may not be what you think it should be. If the Employee User ID is not correct, it can cause major problems within the system.



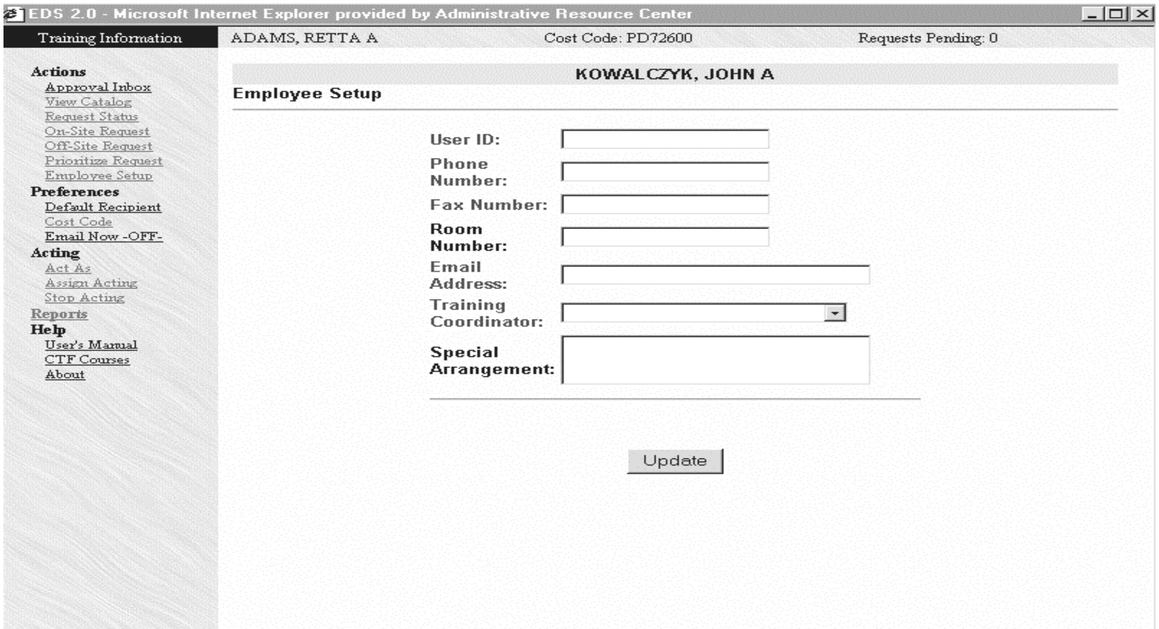
When do I enter information?

Enter information when you receive a new employee from the NFC download—normally one month after employment begins.

What do I enter?

- User ID
- Phone number
- Fax number
- Room number
- Email address
- Training coordinator
- Special arrangement

Procedure	1	Select Cost Code from the **Preferences** menu.
	2	Click on the cost code you need to add an employee. If you have multiple cost codes you will have to repeat this procedure for each cost code.
	3	Click on Employee Setup from the **Actions** menu.
	4	Add all information necessary to run EDS.



When do I edit information?

Edit information when you receive an employee from another cost code or if information changes. **NOTE:** periodically you should check the information for accuracy.

What do I edit?

- User ID
- Phone number
- Fax number
- Room number
- Email address
- Training coordinator
- Special arrangement